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SADC
Trade

TRADE INFORMATION BRIEF

SOYA BEANS



Australian Government
AusAID



Participation in international trade has become one of the most important factors in increasing the prosperity of countries. Yet for many developing countries, perhaps particularly for those in Sub-Saharan Africa (SSA), trade is viewed primarily from a defensive perspective, with a focus on the disruptive effects of imports rather than on the opportunities presented by increased access to world markets. A key reason is the existence of information market gaps that are often associated with trade facilitation and development in developing countries – information on the export performance and potential of many developing countries remains incomplete.

The **TRADE INFORMATION SERVICE** series of market briefs aims to contribute to bridging this information gap for existing producers in the Southern African Development Community (SADC) who may not have the financial resources to generate a fully fledged market research process. The briefs are not intended to act as the detailed export market intelligence that successful exporting requires, but rather as a basic first-cut analysis of export prospects, to allow enterprises to make the decision on whether to initiate further market research.

Each Trade Information Brief will cover a product cluster of particular interest to members of SADC. The cluster may represent an existing key set of export products with potential for expansion, or a relatively new set where there is an indication of competitive advantage for the region.



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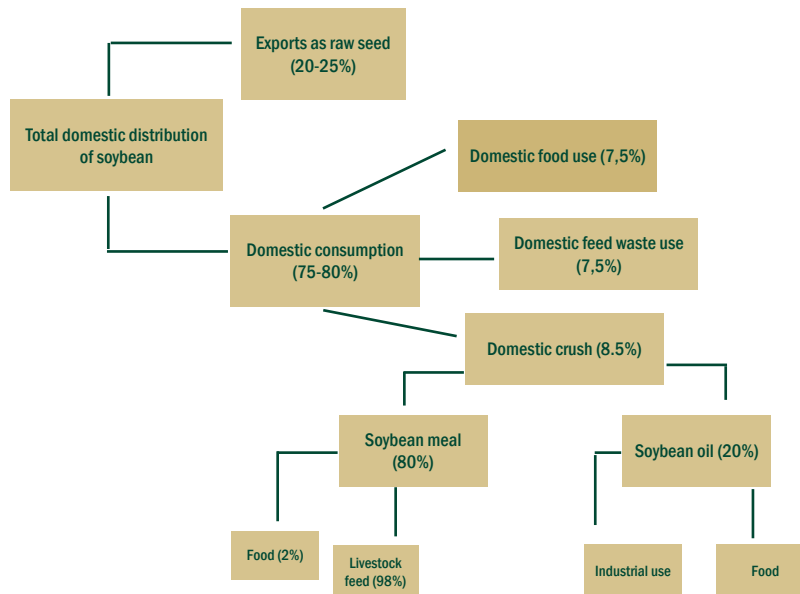
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1. Introduction



Source: Based on calculations from USDA/PSD online data

Soybeans are primarily exported as raw seeds to meet processing, sowing or food demand. Soybeans are crushed to separate and extract from them high protein meal and vegetable oil. On average, the crush demand of oilseed, makes up roughly 80% of total demand and the remainder is used as food or farm feed.

Of the processed soybean, meal accounts for nearly 80% of the physical output, and is considered the most valuable end product of soybean processing. The remaining 20% is used to make soybean oil. Soybean meal is used primarily as livestock feed. A small percentage is used for baking ingredients and meat substitutes (e.g. tofu). Soybean meal is the world's most important protein feed and accounts for nearly 65% of world protein feed supplies. In the US, livestock feed makes up 98% of total US soybean meal consumption, and the rest is for human consumption. The yield from soybean oil is considerably lower than of other oilseeds like sunflower seeds and canola. Soybean oil is primarily used in salad and cooking oils, bakery shortening, frying fat and margarine. Important industrial applications of soybean oil include its use in the manufacture of bio-diesel.

The demand for soybean oil or soybean meal used in food, is largely a by-product of the mainstream activity of producing high protein livestock feed from soybean meal.

References

A full set of references for this report can be accessed at www.sadctrade.org/TIB/soybean

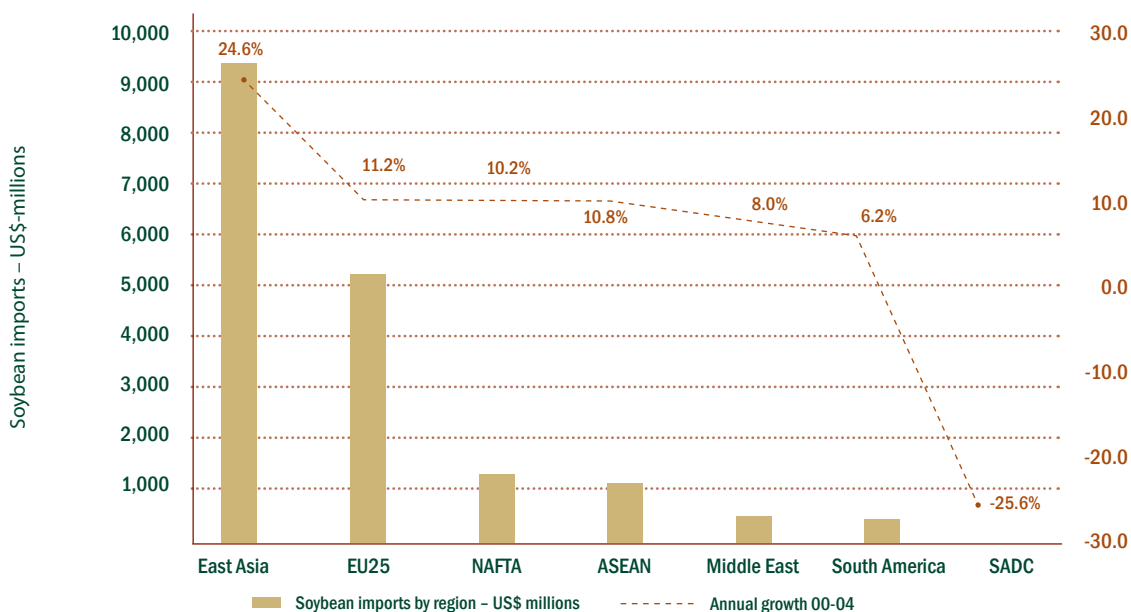
All monetary figures are in nominal US\$.

2. Trade at a Glance

2.1. Major soybean importing and exporting regions

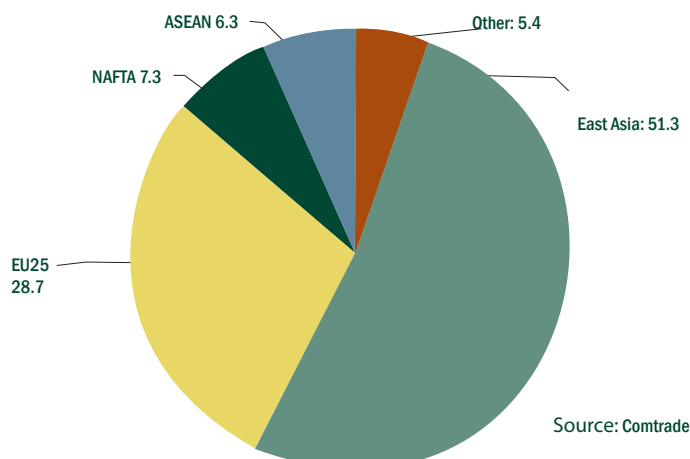
World soybean imports have grown rapidly by an average annual compounded growth rate of almost 17% per year between 2000 and 2004, or 9.5% each year over the last eight years. In absolute terms, world soybean imports have increased from about US\$8.7 billion in 1996 to more than \$18bn in 2004, largely attributable to the rapid growth and development of Asian economies. The figure below gives us an idea of the major importing regions of soybeans and their respective growth rates in 2004.

Figure 1: Leading soybean importers by major world region in 2004 (US\$-millions) and growth rates



Source: Comtrade

Figure 2: World soybean importers share of major world region in 2004 (%)

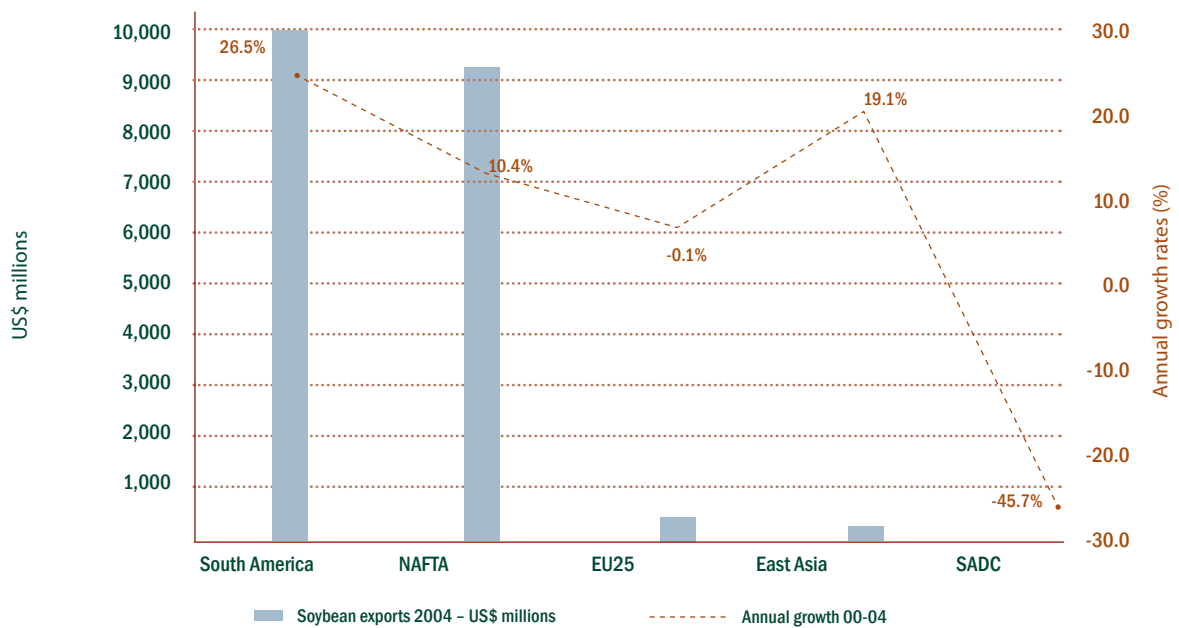


Source: Comtrade

Major importing regions of soybeans in 2004 were East Asia, with just over half of total world imports in 2004 (\$9.2bn), and the EU25 with almost a 29% world import share of soybeans in 2004 (\$ 5.2bn). Collectively, these two regions made up 80% of total world imports of soybeans in 2004. Other leading importing regions in 2004, though relatively less significant, were the NAFTA region (7.3%), South East Asia - ASEAN (6.3%), the Middle East (2.8%) and South America (2.6%).

Average growth of imports into these regions were very high, growing in excess of eight percent each year over the last four years, especially in East Asia, which grew by close to 25% per year between 2000 and 2004. The EU25 and the ASEAN imports grew by around 11% per year over the same period.

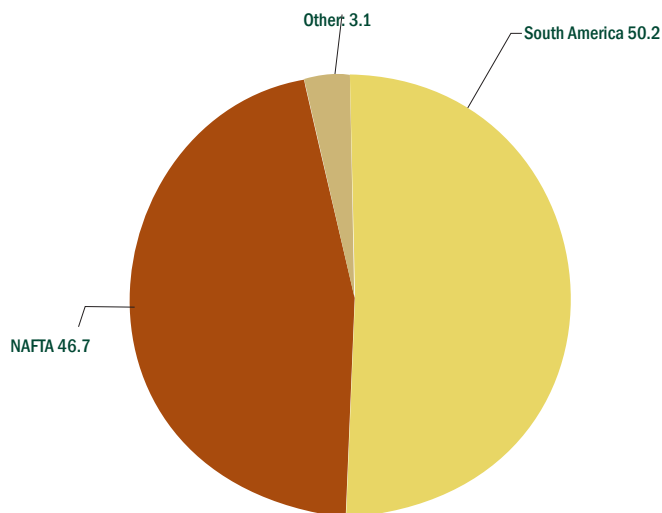
Figure 3: Leading soybean exporters by major world region in 2004 (US\$-millions) with growth rates



Source: Comtrade



Figure 4: World soybean importers shares by major worldregion in 2004 (%)



Source: Comtrade

Major exporting regions of soybeans in 2004 were South America making up half of total world exports at 50.2% (or about \$9bn) and NAFTA¹ region with a 47% share of world exports. Collectively, these two regions controlled almost 97% of total world exports of soybeans in 2004.

The table below provides us with information pertaining to leading importers of soybeans and their suppliers and in what proportions they trade with each other. For example, virtually all of East Asia's import needs were met by South America and NAFTA, with NAFTA providing 55.3% of East Asia's total imports and South America 43.4%. The EU, on the other hand, sourced more than two-thirds of its import needs from South America with 26.4% from NAFTA and six percent constituting intra-trade.

Unsurprisingly, much of NAFTA trade (more than three quarters) occurred within the region. However, South America supplied a fifth of the region's total import demand. South America's intra-trade accounted for approximately 90% of its total import demand of soybeans in 2004, with NAFTA supplying the rest (9.7%).

SADC's total imports in 2003 came mainly from the Mercusor region (33.9%), with 9.5% from the EU and 7.9% of SADC total import needs in 2003 coming from NAFTA. Almost half (47.6%) of SADC's total imports of soybeans in 2003 was sourced from within the region.

¹ North American Free Trade Area (US, Canada, Mexico).

Table 1: Leading soybean importers and exporters by major world region in 2004 (US\$-millions)²

		Exporter						
Export destination	Regional import shares	World exports	South America	NAFTA	EU25	East Asia	SADC	
	World	100%	18,029	9,046	8,420	327	149	7
	East Asia	51.3%	9,253	43.4%	55.3%	0.0%	1.3%	0.0%
	EU25	28.7%	5,180	67.5%	26.4%	6.0%	0.1%	0.0%
	NAFTA	7.3%	1,320	21.0%	76.8%	0.6%	1.5%	0.0%
	ASEAN	6.3%	1,135	47.0%	52.2%	0.0%	0.2%	0.0%
	Middle East	2.8%	497	43.9%	41.6%	1.8%	0.0%	0.0%
	South America	2.6%	465	90.3%	9.7%	0.0%	0.0%	0.0%
	SADC ³	0.1%	14	33.9%*	7.9%	9.5%	0.0%	47.6%
Regional export shares (%)		100.00	50.2	46.7	1.8	0.8	0.04	

Source: Comtrade Data

* Mercusor countries

2.2. Major soybean importing and exporting countries

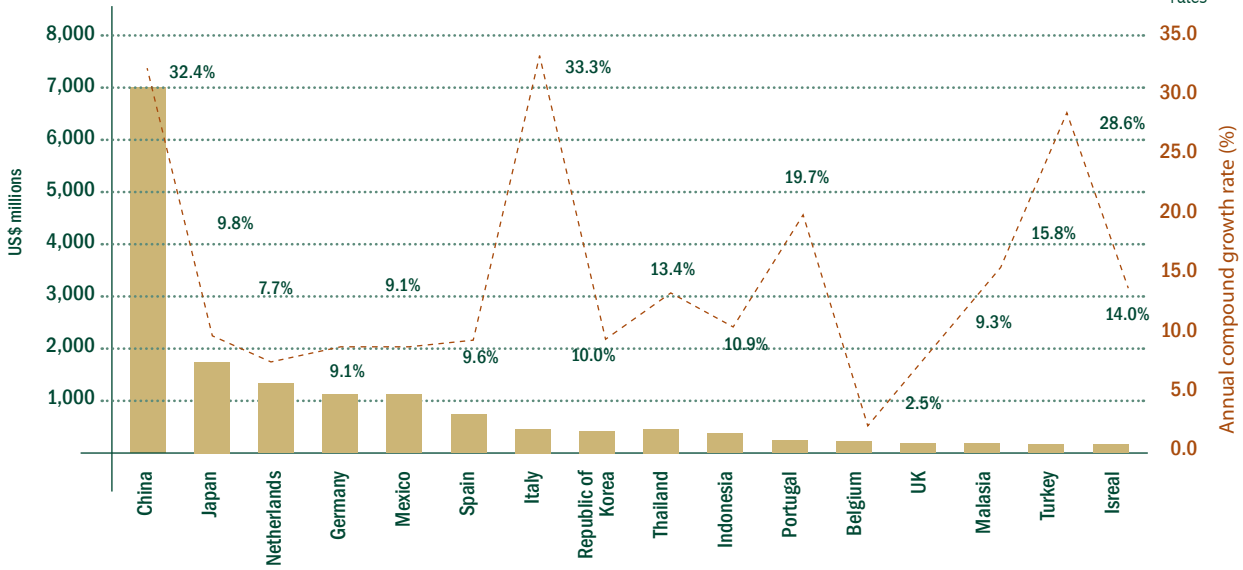
China was by far the world's largest importer of soybeans in 2004, importing almost 39%, or \$7bn of total world soy bean imports in 2004. The second largest importer, Japan, had a 10% market share. More impressively, given its large market share, the average annual growth of soybean imports into China was more than 32% per year between 2000 and 2004.

With large disparities in the share of world imports, other major importers were Japan (9.9%), Netherlands (7.4%), Germany (6.3%) and Mexico (6.1%) with respective annual growth rates of 9.8%, 7.7%, 9.1% and 9.1% per year respectively over the last four years. In fact, all the major importers listed above, with the exception of Belgium, experienced growth in excess of 7.5% per year between 2000 and 2004.

² This table is based on import data. The table is read with exporting regions/countries in the columns and importing regions/countries in the rows, so that the intersection of the World and South America in the first row, for example, must be read as total world imports of soybeans from South America (\$9bn in 2004).

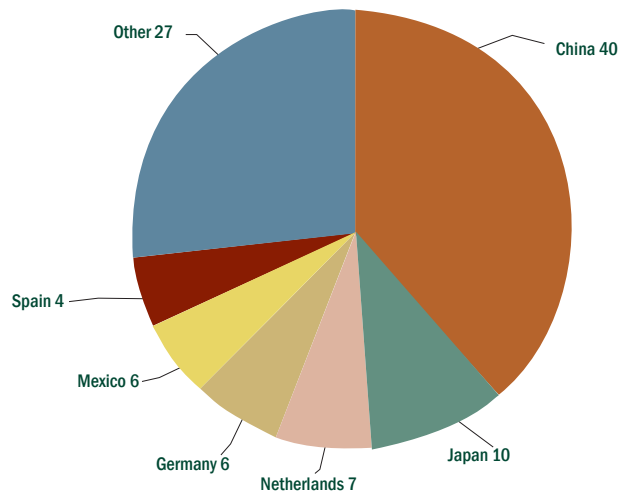
³ Due to data discrepancies, 2003 data was used for SADC. The world imports total was still taken from UN Comtrade, while SADC world imports are taken from the SADC Trade Database. Its exports are taken from calculations as per table 3 below.

Figure 5: Leading soybean importers by country in 2004 (US\$-millions) and growth rates



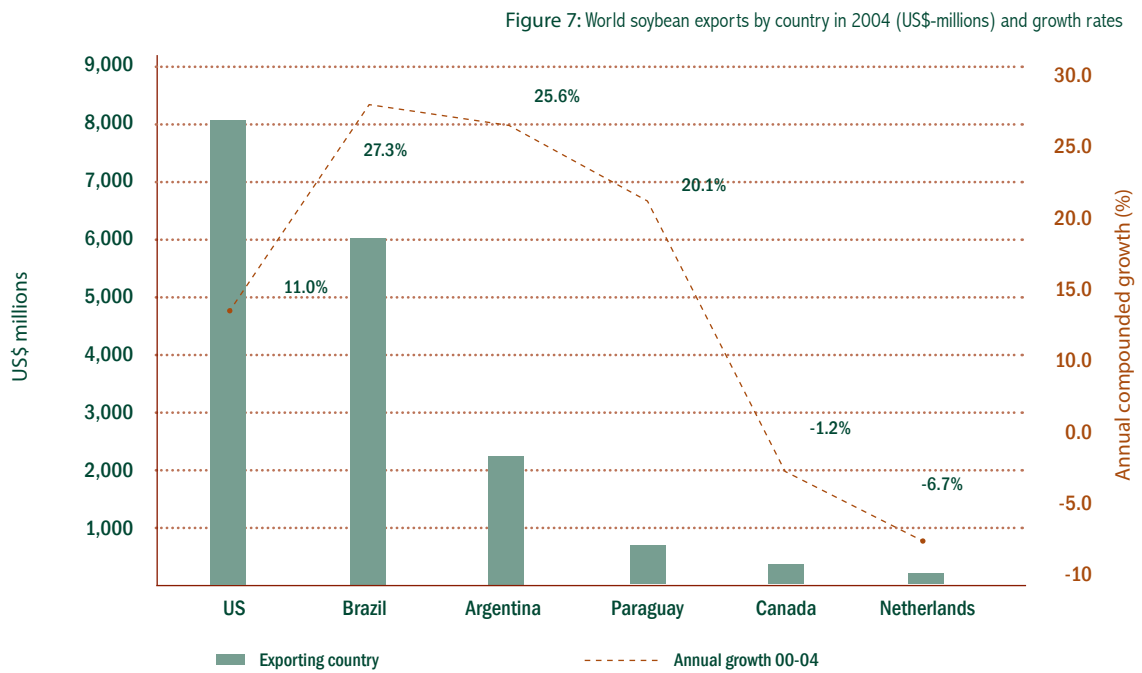
Source: Comtrade

Figure 6: World soybean imports market shares by country in 2004 (US\$-millions):



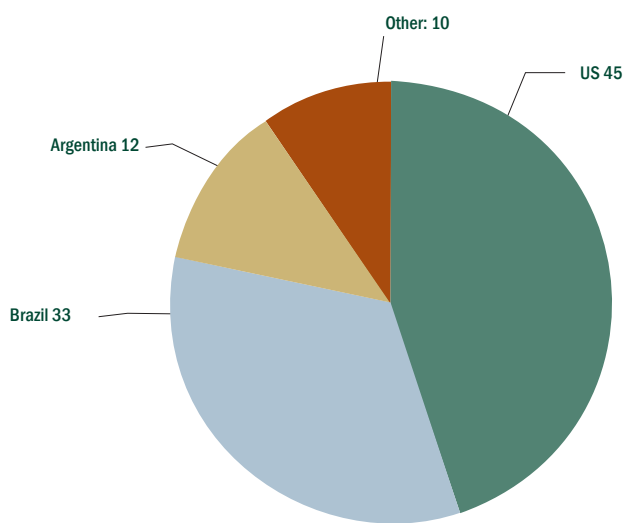
Source: Comtrade

Major exporting countries and their respective growth rates and shares are depicted in the figures below. The US and Brazil were the world's two leading exporters of soybeans in 2004, at 44.9% and 33.3% respectively, supplying a total of \$14bn of the \$18bn imported in 2004. However, the US's exports to world markets grew by an annual rate of 11% over the last four years, while Brazil grew at more than 27% per year over the same time period. Argentina was the third largest supplier, supplying 12.3% of total world exports of soy beans in 2004, at a rate of more than 25.5% a year over the last four years. Also impressive is the growth of Paraguay's exports over the last four years (20.1% per year), highlighting the strong presence of South America in exporting soybeans in recent years (as highlighted under the regional analysis).



Source: Comtrade

Figure 8: World soybean exports market shares by country in 2004 (US\$-millions)



Source: Comtrade

Table 2: Leading soybean importers and exporters by country in 2004 (US\$-millions)⁴

Importer	Exporter								Import share
	World	US	Brazil	Argentina	Paraguay	Canada	Netherlands	Residual	
World	18,029	8,091	5,999	2,216	634	329	186		
China	6,979	48.0%	29.8%	22.2%	0.0%	0.1%	0.0%	0.0%	38.7%
Japan	1,779	70.2%	16.7%	0.0%	0.0%	6.9%	0.0%	6.2%	9.9%
Netherlands	1,335	23.4%	65.3%	0.8%	6.1%	0.9%	0.0%	3.5%	7.4%
Germany	1,139	36.3%	43.0%	1.4%	6.4%	0.4%	7.3%	5.3%	6.3%
Mexico	1,108	75.8%	18.5%	1.9%	2.9%	0.0%	0.0%	0.8%	6.1%
Spain	782	28.7%	68.3%	0.3%	0.3%	0.6%	0.0%	1.8%	4.3%
Italy	482	6.1%	63.7%	0.8%	24.1%	0.1%	0.0%	5.2%	2.7%
Rep. of Korea	480	77.8%	19.1%	0.0%	0.0%	0.2%	0.0%	2.9%	2.7%
Thailand	471	24.6%	29.4%	39.4%	0.0%	5.2%	0.0%	1.4%	2.6%
Indonesia	417	78.9%	0.0%	20.4%	0.0%	0.0%	0.0%	0.6%	2.3%
Portugal	273	18.3%	69.4%	0.0%	3.4%	2.0%	0.0%	7.0%	1.5%
Belgium	267	32.1%	27.3%	0.3%	0.1%	7.2%	31.8%	1.2%	1.5%
UK	238	8.8%	81.0%	0.2%	0.0%	3.9%	0.6%	5.6%	1.3%
Malaysia	238	35.8%	13.5%	29.6%	0.0%	12.6%	0.0%	8.5%	1.3%
Turkey	227	42.4%	3.0%	38.6%	8.3%	1.6%	0.0%	6.2%	1.3%
Israel	202	35.4%	26.9%	10.1%	0.0%	0.2%	1.2%	26.1%	1.1%
Export share		44.90%	33.30%	12.30%	3.50%	1.80%	1.00%		

Source: Comtrade Data

The table above gives a list of the major importers of soybeans in 2004 and their major suppliers. The US provided close to half of all China's imports, about three quarters of Japan and Korea's soybean import needs in 2004. The remainder of China's needs were met by Brazil and Argentina with respective shares of 29.8% and 22.2%.

Three quarters of Mexico's total import needs were met by the US, with Brazil supplying the bulk of the residual demand, leaving very little room for other suppliers into that market. EU countries were mainly supplied by South American countries (Brazil, Argentina and/or Paraguay), instead of the US or NAFTA.

Israel was the only country on the list that had a large residual after accounting for supply from the major world exporters/producers, with 26.1% of its soybean import needs not met by these major countries. However, this residual has been filled by other European countries viz. Switzerland (17.3%), Norway (4.3%) and Germany (2.6%).

⁴ This table is based on import data

2.3. SADC trade

Virtually all of the SADC's world trade of soybeans in 2003 (99.5%), occurred within the region i.e. only \$37,000 worth of soybeans were exported outside the region relative to the \$ 6.9m traded within the region.

Table 3: SADC exports of soybeans (US\$) – 2003⁵

		Export destination						Total	Export share (%)
		France	Kenya	Malaysia	Romania	US	SADC		
Exporter	DRC	-	-	-	-	-	3,549	3,549	51.2
	South Africa	-	-	13	16	2	1,621	1,652	23.8
	Zambia	-	-	-	-	-	704	704	10.1
	Malawi	-	1	-	-	-	626	627	9.0
	Tanzania	-	-	-	-	-	333	333	4.8
	Zimbabwe	-	-	-	-	-	65	65	0.9
	Madagascar	5	0	0	0	0	-	5	0.1
	Total	5	1	13	16	2	6,898	6,934	100.00
Import share (%)		0.1	0.0	0.2	0.2	0.0	99.5	100.0	

Source: SADC Trade Database

Table 4: SADC intra-trade in soybeans (US\$'000s) 2003⁶

		Export destination									Export share (%)
Country		Zambia	South Africa	Botswana	Lesotho	Swaziland	Malawi	Mozambique	Madagascar	SADC Total	
Exporter	DRC	3,549	-	-	-	-	-	-	-	3,549	51.5
	South Africa	-	-	605	468	398	0	110	36	1,621	23.5
	Zambia	-	704	-	-	-	-	-	-	704	10.2
	Malawi	600	-	-	-	-	-	23	-	626	9.1
	Tanzania	-	-	-	-	-	333	-	-	333	4.8
	Zimbabwe	22	-	42	-	-	1	-	-	65	0.9
	SADC Total	4,171	704	647	468	398	334	133	36	6,898	100.0
	Import share (%)		60.5	10.2	9.4	6.8	5.8	4.8	1.9	0.5	

Source: SADC Trade Database and Comtrade

⁵ These tables are based on import data. Due to data constraints, the se tables have been constructed using information from both the SADC Trade Database (accessed through www.tips.org.za) and that UN/Comtrade Database due to data discrepancies. In addition, 2003 data has been used.

⁶ In this table, 'exporting' countries are in the rows and importing countries are present in the columns, such that the intersection on the DRC and Zambia in the first row means that Zambia imported US\$3,5 million worth of soybeans from the DRC in 2003.

Given the very significant share of SADC intra-trade in the region's total trade, it is worthwhile examining SADC intra-trade to identify the region's major importers and exporters. SADC intra-trade in 2003 is tabulated in Table 4.

At first glance, this data implies that there are broad and existing production capabilities across SADC countries. In 2003, total SADC intra-trade amounted to close to \$7m with the Democratic Republic of Congo (DRC) being the region's largest exporter, with more than half of the region's total exports or \$3.5m. South Africa was the second largest exporter to the rest of SADC with a 23.5% share or \$1.6m in 2003.

The DRC exported all its soybeans to Zambia, which made the latter the region's largest importer with a 60.5% regional import share in 2003, and exported very little (only a 10.2% SADC export share) relative to its total regional imports. In fact, Zambia was the region's second largest importer (behind South Africa) of soybeans in 2003 with its total world imports amounting to \$4.1m or 29% of the region's total imports from the world. This implies that Zambia has very high domestic consumption of soybeans. South Africa was the region's largest importer of soybeans in 2003 with total imports amounting to \$5.5m or a 39% share of the region's total soybean imports in 2004.

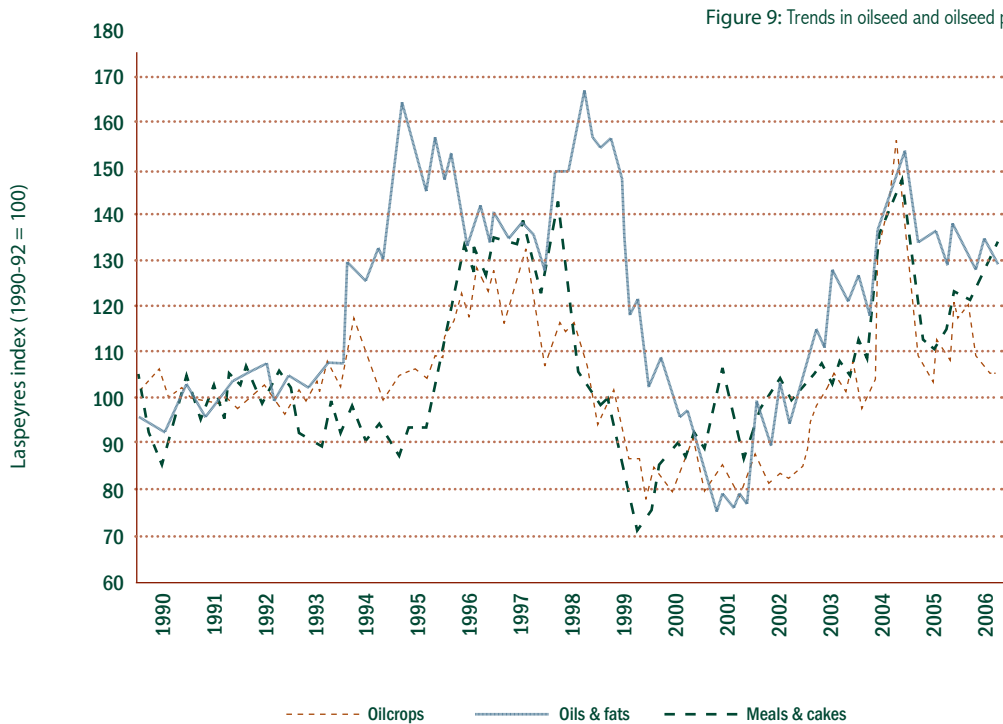
At the same time, it begs the question as to why the DRC does not engage in domestic crush activities. It seems that the lack of infrastructure and political instability (hence the lack of required investment) are reasons for the lack of sufficient crushing capabilities.





3. Prices

In general, the international oilseed, meal and oils market has been characterised by a recovery of prices (and a corresponding expansion in production) in recent years. The 2002 to 2003 season was the start of a price recovery in oilseeds. The 2003 to 2004 season saw prices return to the highs of the mid 1990's. It has been noted that poor growing conditions in key producing regions caused the rise in prices. However, in 2004 there was a spike in the production of oilseeds as a result of a yield recovery and an increase of land areas for production induced by the higher prices. As such, the surge in production in 2004 caused market prices to fall from their peaks.



Source: FAO Commodity Trade Division

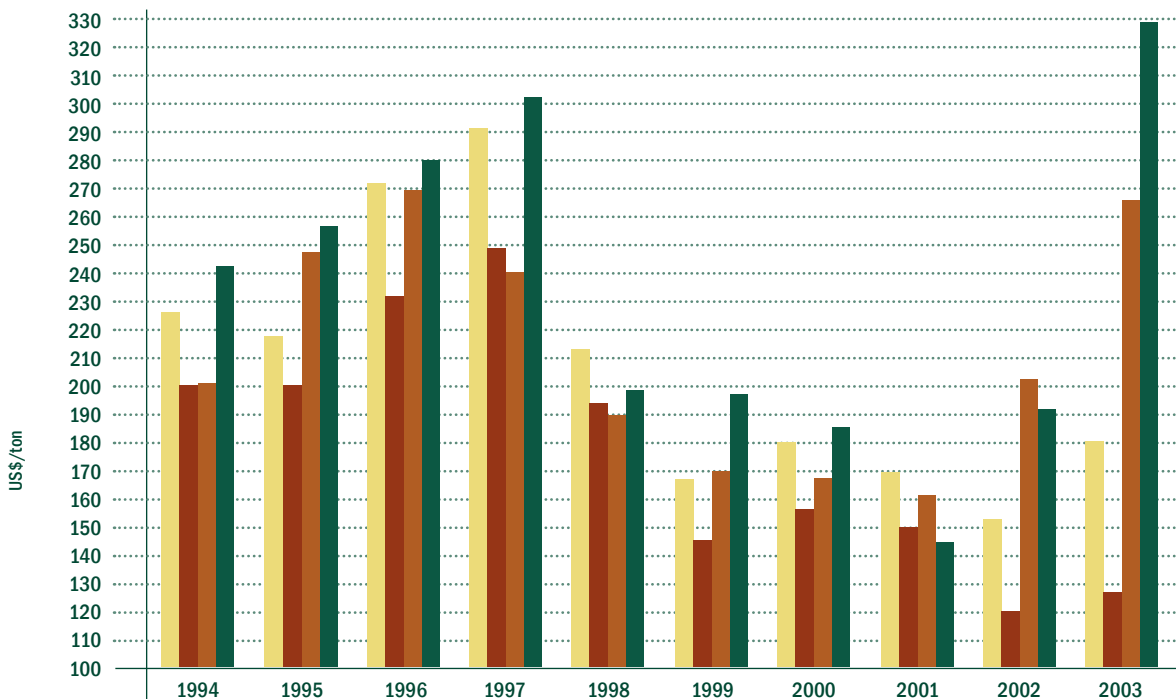
⁷ The index is derived from a trade-weighted average of a selection of representative internationally traded products.

3.1. Producer prices – leading producers and South Africa

The figure below gives an indication of the disparities in the cost of producing soybeans between three of the world's major producers, the US, Brazil and Argentina. South Africa is included to get some idea of the relative advantage or disadvantage.

Among the leading producers in 2003, the US had the highest cost of producing relative to the two South American countries. Given its export and production performance, this implies that government domestic support plays a very important role in that economy. Brazil has the lowest cost of production of almost \$130 per ton, followed by Argentina at almost \$180 per ton. The US producer price stood in excess of \$265 per ton. The South African cost of producing soybeans in 2003 was significantly higher than the US, at almost \$330 per ton. The disparities are primarily attributed to the comparative advantage of the South American countries relative to the US in agriculture, and the greater availability of farmland relative to the US. Furthermore, Brazil's average soybean yields have exceeded those of the US over recent years. In the case of Argentina, its financial crisis in 2002 caused a depreciation of its currency, which instantly improved the country's competitiveness in agricultural commodities.

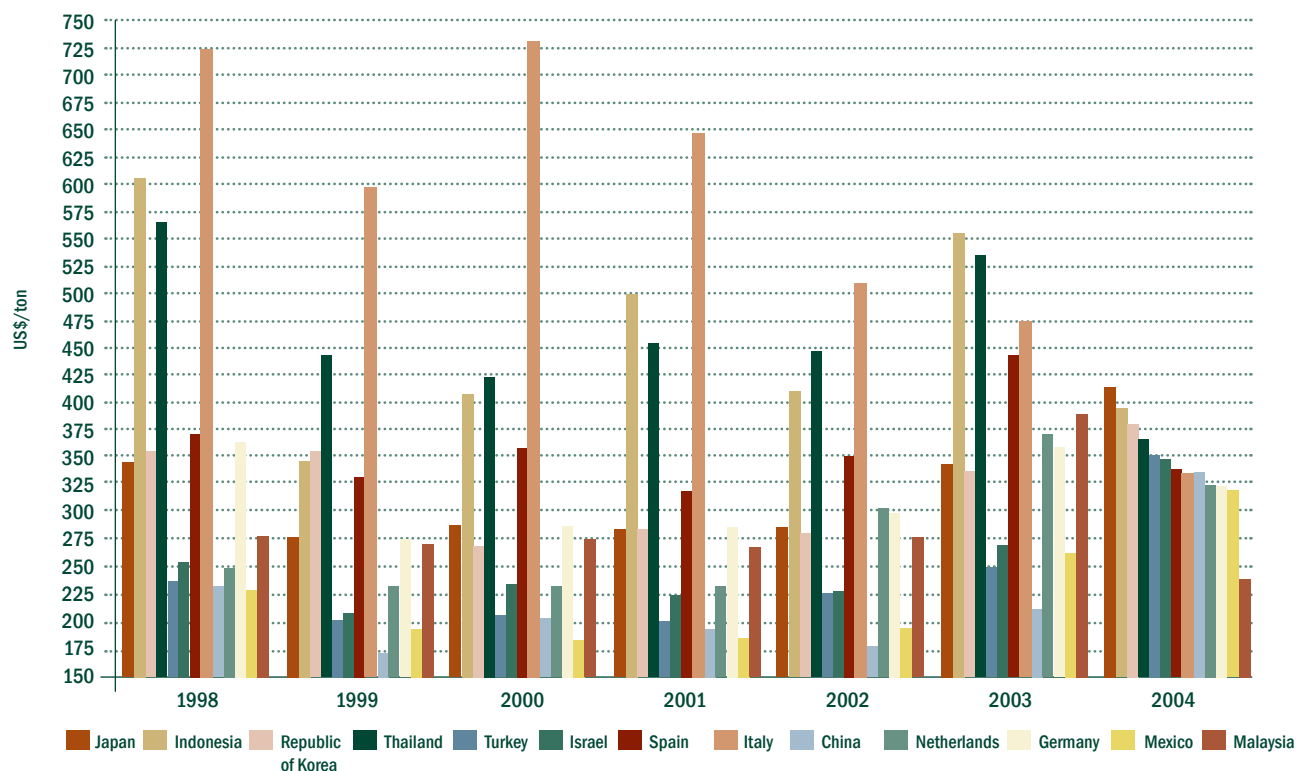
Figure 10: Product prices of soybeans (US\$ per ton)



Source: FAOSTAT | © FAO Statistics Division 2006 | 26 October 2006

3.2. Import prices – major importers

Figure 11: Average import unit value of soybeans (US\$ per ton)



Source: FAOSTAT | © FAO Statistics Division 2006 | 26 October 2006

The figure above gives us the average import prices of soybeans for the leading importers in 2004 ranked according to the highest average import price in 2004. These prices include the effect of tariffs of the respective countries, and serve as a guide to the domestic producer of the price she or he will face or have to compete with, after considering transports costs and profit margin. In 2004, relative to previous years, there appears to be a dramatic decline in the dispersion and level of average import prices across major importing countries. This can be partly attributed to the poor growing conditions in 2002 and 2003 that saw a recovery and spike in world oilseed and soybean prices by the end of 2003. Brazil's production growth stagnated over these periods due to two consecutive droughts and a widespread invasion of soybean rust. High demand and the subsequent higher world prices were the main reasons behind the disparity and level of average import prices in 2003, especially when individual country tariffs and their respective

excess demands are taken into account. However, a recovery by Brazil and a price induced increase in production globally in 2004 and rising stocks saw world prices settle at much lower levels.

Given the fact that South Africa's producer price is \$330 per ton, it is worth mentioning that average import prices of the major EU importing countries (\$322-325), Mexico (\$320) and Malaysia (\$239) are all below this amount. China's average unit import price stands at \$336. However, improvements in domestic infrastructure and greater specialisation and support for domestic production can allow SA to dramatically reduce producer prices.

Major importing countries with the highest average import prices include Japan (\$414), Indonesia (\$395) and Korea (\$380), despite its prohibitive tariff (see later sections), are all well above South Africa's producer price.





4. Soybean production and use - The case of China

This section aims to provide insight into the patterns of trade highlighted in section Two. It attempts to show why China and the EU are major importers and why these markets may appear to be stable markets for domestic exporters to consider when trying to place their output in foreign markets over the near to medium term. The table below has various ratios calculated from data from the USDA, and denominated on a volumetric basis such that all figures are directly comparable.

Table 5: World production, supply and distribution of soybeans in 2004/5 ('000's tons)

Country	Dom. crush/ dom. cons(%)	Dom. cons/ dom. prod(%)	Imports/ dom. prod(%)	Exports/ dom. prod(%)	Dom. prod/ total supply(%)	Imports/ total supply(%)
World	85.6	95.1	29.4	29.9	67.9	20.0
China	75.5	231.1	148.3	2.2	38.4	57.0
EU-25	90.7	1963.0	1862.3	1.4	4.8	89.7
Argentina	95.0	73.7	1.8	23.9	70.8	1.3
Brazil	91.1	60.6	0.9	38.0	76.8	0.7
US	89.8	60.5	0.2	35.1	96.4	0.2
India	86.4	99.5	0.0	0.1	98.9	0.0

Source: Calculated from data obtained from USDA/PSD online

Domestic crushing activities make up most demand from domestic consumption, with demand ranging from between 75% – 95% across major importers and exporters.

The ratio of domestic consumption to domestic production (DC/DP) is an indication of the extent to which a country is able to satisfy its domestic demand with its domestic production. If this ratio exceeds unity it implies that domestic production is insufficient to meet domestic consumption demands. As such, that country is likely to be a net importer of the commodity in question.

Immediately noticeable are the exceptionally high ratios (in excess of unity) of China and the EU, the world's two largest importers of soybeans. With China, its domestic consumption demand exceeds its domestic production by more than two fold, while the EU had a DC/DP ratio that was almost 20 times higher than unity, implying that its domestic consumption of soybeans was 20 times higher than what was being produced domestically to satisfy that demand. This is primarily due to the fact that the EU25 is not a major producer of soybeans.⁸

The ratio of 0.9 for the EU implies that almost all supply was made up of imports. The major exporters (US, Brazil and Argentina) have DC/DP ratios of less than unity, implying that domestic production exceeded domestic consumption. Their M/TS ratio are very low, almost zero, while their exports to domestic production (X/DP) ratios are sig-

⁸ Total Supply = Domestic Production + Total Imports + Beginning Stocks

nificantly higher than the major importers. India appears to be self-sufficient in terms of its consumption, production and trade, with its DC/DP ratio unity, and its M/TS and X/DP ratio being zero.

For the SADC exporter, the main conclusion that arises from the above table is that the EU and China appear to be significant and stable importers of soybeans. This is primarily due to the fact that their domestic production levels are very low relative to the domestic consumption of soybeans. This is quite prominent in the EU, where domestic production is so low that its strong and high crushing demand will warrant imports of soybeans from international markets over the medium term at least.





5. Demand drivers

The demand for soybeans is largely from the crushing or processing industries. Factors that increase the demand for meal and soybean oil result in a greater demand of soybean through increased crushing activities.

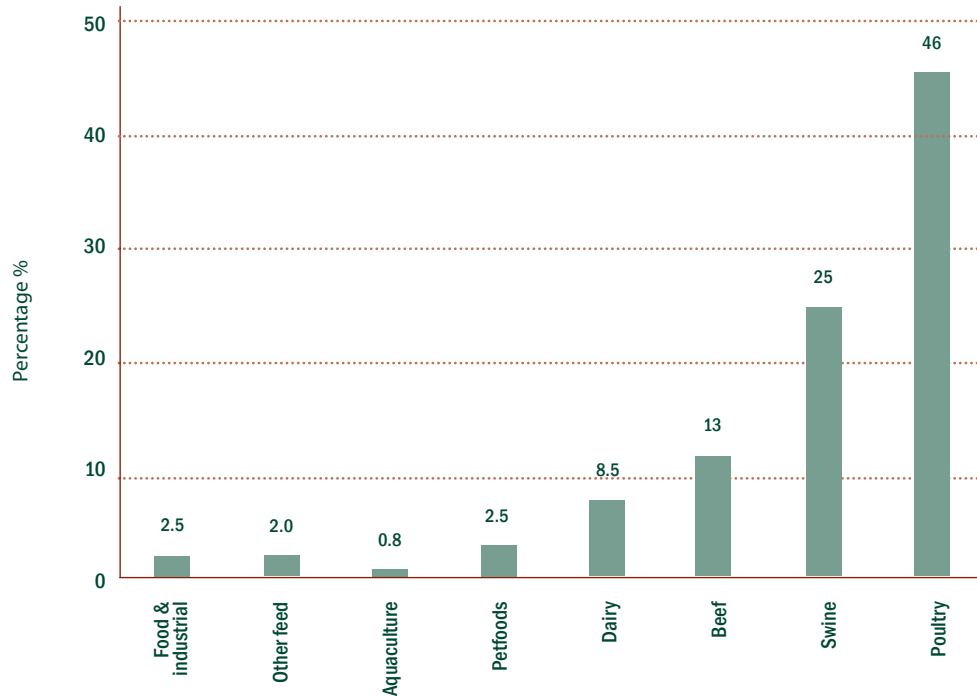
Rising incomes (per capita GDP) and population leads to a higher demand for livestock products as food consumption increases. This, in turn, stimulates the demand for animal feed as the 'production' of livestock is increased to meet rising food demand. As such, the demand for oilseed meal also rises as more protein feed is being demanded.

Likewise, rising incomes and populations will also lead to a greater consumption of vegetable oils as the demand for cooking oils and dairy products increases. However, the use of soybean oil in cooking and other food preparation activities is relatively lower than for other oils from other oilseeds viz. canola and sunflower. Only in the US is soybean oil used extensively, with it representing approximately 79% of all edible oil consumed.

China's performance as the largest and fastest growing import market of soybean (and soybean meal) in recent years is attributed to the rapid growth of its domestic economy, which has spurred both food consumption and the demand for higher protein foods. To meet its rising vegetable oil and animal feed demand, China must import 55% to 60% of its total domestic consumption of soybeans. More importantly, China is seen to be a major growth market over the next decade.

The figure below gives us a better idea of how soybean meal is allocated across its uses in the US in 2002 to 2003. The important point is the use of meal for livestock feed. In fact, of global major protein meal production, which also includes the production of fish meal, soybean meal makes up, on average, about 70% of all protein meals produced every year, and has been described as the world's most important protein meal/feed (calculations from USDA data).

Figure 12: Soybean meal use in the US 2002/3



Source: <http://www.soymeal.org/pdf/processing3.pdf>

Another factor stimulating the use of soybean protein in foods globally is the increasing awareness of its health benefits, as consumers around the world are becoming more and more health conscious.

With regards to non-food uses, soybean oil is the main vegetable oil used for the manufacture of bio-diesel in the US, primarily due to its status as the world's largest soybean producer. Any vegetable oil can be used in the manufacture of bio-diesel including sunflower, canola (rapeseed) and palm oils.

Bio-fuel production, in general, has been steadily increasing in recent years. Many countries around the world have implemented statutory obligations that warrant the use of a specific percentage of bio-fuel to be mixed with conventional petroleum based fuels. This extends to the use of bio-diesel blended with petroleum based diesel. The need to meet this requirement by fuel manufacturers will result in the demand for bio-diesel and vegetable oils.

Bio-diesel can be produced from vegetable oils from any oil crop, and not necessarily from soybean only. However, if the demand for bio-diesel is sufficiently large and increasing, perhaps due to statutory regulations in developed countries (where crop land is a definite constraint), vegetable oil (soybean) and/or the raw oilseed would have to be imported into that country.



6. Market access

6.1. Tariff barriers

China was the world's largest importer of soybeans in 2004 and had a 38% import share, which grew at an average annual rate of 32.4% per year over four years to 2004. Across a range of soybean products at the 10 digit HS level, its applied tariff is a zero percentage duty on soybean seeds and a three percent duty on yellow, black, green and other soybeans excluding the seeds. These are not particularly prohibitive tariffs, and do not represent any major barrier to market access into this large and rapidly growing market.

The EU25 and Japan have bound duty rates of zero, and their applied rates cannot exceed this. This implies that all exports of soy beans entering these countries/regions will enter duty free, irrespective of the source.

Mexico is somewhat more complex. It has a classification of soybeans entering its borders into 3 ten digit HS codes: 12010001, 12010002 and 12010003. The first two products have Most Favoured Nation (MFN) duty rates of 0%, and can enter the country duty free. However, the last product has a relatively higher and somewhat prohibitive MFN tariff rate of 15%. Preferential treatment is awarded to EU countries (5.1%) and Brazil (3%). In addition, other NAFTA countries viz. US and Canada, together with Bolivia, Chile and Uruguay all have a 0% preferential tariff on soybeans.

Korea actually has a specific tariff applied to soybeans imports that is quite prohibitive, and is applied on a MFN basis. All soybeans entering Korea are subject to a duty rate of 487% on the value of soybeans imported or 956 won / kg, whichever of the two is greater.

Table 6: Applied tariffs on soybeans – major importers of 2004:*

Major importing countries	Product code	Product description	Ad-valorem tariff (%)	Additional notes
1. China (38%)	1201001000	Soya bean seed	MFN 0	
	1201009100	Yellow soya beans excl. seed	MFN 3	
	1201009200	Black soya beans excl. seed	MFN 3	
	1201009300	Green soya beans excl. seed	MFN 3	
	1201009900	Other soya beans excl. seed	MFN 3	
2. Japan (9.9%)	120100010	Soya beans, yellowish white	MFN 0	
	120100090	Soya beans, excluding yellowish white	MFN 0	
3. EU25 (28.7%)	1201001000	Soya beans for sowing	MFN 0	
	1201009000	Soya beans (excl. for sowing)	MFN 0	
4. Mexico (6.1%)	12010001	Description not available	MFN 0	
	12010002	Description not available	MFN 0	
	12010003	Description not available	MFN 15	
			0	Preferential tariff for Canada, US, Bolivia, Chile and Uruguay
			3	Preferential tariff for Brazil
			5.10	Preferential tariff for EU countries
5. Rep. of Korea (2.7%)	1201001000	Soya beans for soya bean oil and oil cake	Specific tariff	MFN - 487% or 956won/kg, whichever is greater
	1201009000	Soya beans, other	Specific tariff	MFN - 487% or 956won/kg, whichever is greater
6. Thailand (2.6%)	1201001	Soya beans: no description at level 8	Tariff rate quota	Up to 10922 tons annually of 1201001: Inside duty: 5%. Outside duty: 6% or B0.3 /KG
	1201009	Soya beans: no description at level 8	Tariff rate quota	Up to 10922 tons annually of 1201009: Inside duty: 5%. Outside duty: 35%.
7. Indonesia (2.3%)	1201001000	Soya beans: suitable for sowing	MFN 0	
	1201009000	Soya beans: other	MFN 0	
8. Malaysia (1.3%)	12010010	Soya beans: suitable for sowing	MFN 0	
	12010090	Soya beans: other	MFN 0	
9. Turkey (1.3%)	1201001000	Soya beans: no description at level 8	MFN 0	
	1201009000	Soya beans: no description at level 8	MFN 0	
10. Israel (1.1%)	120100	Soya beans	MFN 0	

Source: Trade Map – accessed through www.tips.org.za

*World import Shares are in parenthesis

Of the remaining major importers viz. Indonesia, Malaysia, Turkey and Israel, soybean imports across various HS levels and codes are exempt from any duties in that they all had 0% MFN rates applied to the product in 2005.

Thailand has a tariff rate quota applied to all WTO members on soybeans at two HS 8 level codes (1201001, 1201009). Imports up to 10,922 tons annually face an inside duty of five percent. The outside duty is applicable only to quantities in excess of the specified 'quota' limit. The duty applicable on quantities exceeding 10,922 tons is subject to a six percent duty for the product code 12001001, and a prohibitive 35% for 1201009.

In general, tariffs do not appear to be prohibitive of trade in soybeans, especially for leading importers like China, the EU25 and Japan. Mexico has somewhat prohibitive tariffs on one classification of soybeans. However, this market appears well supplied by NAFTA and other South American countries, which have either very low or no tariffs on soybeans as a result of preferential trading agreements.

6.2. Non-tariff barriers – sanitary and phytosanitary (SPS) and related issues

Increasing trade in oilseed over the last decade has also seen a rapid increase in issues surrounding sanitary and phytosanitary (SPS) requirements pertaining to oilseed and related products. It has been argued that SPS requirements have been wrongfully used to restrict the importation of oilseeds and products in some countries in an attempt to protect domestic producers, especially against the backdrop of World Trade Organisation commitments and obligations to reduce tariff barriers and increasing trade liberalisation. The WTO has ruled that countries are well within their rights to impose such restrictions to protect domestic consumers, as long as such restrictions are not imposed on an arbitrary basis but rather after scientific investigation.

SPS regulations and requirements are implemented primarily on the basis of human, animal and crop health, protection and safety. Since oilseeds are primarily destined for animal feed and/or human consumption (directly as food or processed into vegetable oils or meals), SPS measures have a direct bearing on oilseeds and their products. Soybeans are no exception.

SPS measures are not usually commodity specific, but are found under broad classifications of food, feed and phytosanitary legislations, which deal with issues of pests and other harmful organisms, usually requiring official phytosanitary certificates of approval by credible bodies. Measures go as far as including issues pertaining to labelling requirements of products, the use of genetically modified organisms (GMO), and the physical handling and/or transportation of goods. Different requirements may apply for different products and vary across countries. As such, it is necessary for the interested exporter to identify these issues pertaining to the export destination under consideration.

Such requirements are enforced or determined by governments through statutory legislation or voluntary codes of practice implemented by the private sector, or by international bodies such as the FAO/WHO Codex Alimentarius Commission which has international standards and guidelines that apply to a wide range of products. Below are some of the general applications of SPS regulations applied to oilseeds which have a bearing on soybeans in international markets.



6.2.1. Oilseed material

Oilseeds are subject to official phytosanitary certification to guarantee the absence of harmful organisms. There may also be regulations on the maximum permissible pesticide residue levels of plant origin destined for the manufacture of food and feeding stuffs. In 2004, 23 exporting firms were banned by the Chinese quarantine bureau after cargoes from Brazil were found to be tainted by fungicide. Later China agreed to lift the ban on imports of Brazilian soybeans after being reassured by tough new phytosanitary rules in Brazil. China adjusted its former zero-tolerance policy to a level that permits up to one fungicide tainted seed per kilogram of soybeans. The quality control has to take place in the port of entry.

6.2.2. Labelling and marketing of food and feedstuffs

Foodstuffs legislation concentrates on labels, product presentation and other advertising aspects to inform and protect consumers. Legislation on foodstuffs and feed is aimed at ensuring the right use of suitable and good quality materials, which do not represent a danger to animal or human health.

6.2.3. Shipping contracts and transport issues

A very large portion of international trade in oilseeds, oils and oil meals is based on widely recognised shipping contracts issued by two international associations. Used on a voluntary basis, these contracts have evolved over many years to suit the needs of the oilseed trade. Included in these contracts are requirements to ensure that goods traded are in good condition and of fair quality. They help trading partners comply with national or international SPS legislation and standards.

6.2.4. Genetically modified organisms (GMO's)

Several genetically engineered crops have been developed in recent years with the aim of improving yields and increasing pest resistance. Concerns around GMO's have resulted in them being subject to legal approval to ensure that they do not pose any danger to the environment, human or animal health. Once approval is granted by specifically established scientific committees, a GMO becomes eligible for importation and circulation within a country. In addition, issues surrounding GMO's have also resulted in regulations pertaining to labeling and marketing, where GMO's used for food, feed or destined for their production must be labeled accordingly.

The European Union has very serious concerns regarding the use and marketing of GMO's, while the same products warrant very little resistance in other parts of the world. Soybeans are one such GMO, and are consumed extensively in the US, but more cautiously in the EU. The other major importer of soybeans i.e. China also appears to have some issues in this regard, but recently changed its stance after scientific testing had been carried out.

With regard to all genetically modified soybeans, there is only one variety that is produced commercially and already in widespread use viz. Roundup Ready® gene soybean .⁹

The European Union

Contrary to popular belief, the EU is actually one of the world's largest importers of GMO's foods and feeds. More specifically, it was the largest importer of soybean and soybean meal (only recently surpassed by China), which is essentially the Round-Up Ready soybean type, as it is this type that is primarily cultivated in major producer countries viz. the US, Brazil and Argentina

Approved GMO's, once having undergone stringent scientific assessment to prove that they do not affect human or animal health can be placed on their markets, in line with international standards, in particular, the Cartagena Protocol on Bio-Safety and guidelines advocated by the Codex Alimentarius Commission of 2003.

Since 2003, all foodstuffs that are regarded as GMO's or those derived from them, for example, livestock feed must be labelled as being a GMO. Other products include additives and flavourings derived from GMO's for human consumption and animal feed. This applies directly to soybeans, and their related products.

China

At the end of 2002, China required all soybean imports to be certified by the exporting country's government that they are non-GMO's. However, in early 2003, China implemented temporary regulations that allowed Brazilian soybeans into China irrespective of their GM content. However, China thereafter demanded a "re-inspection" clause to be included into all contracts. In September 2003, China began issuing import permits as an interim import measure, claiming that they were quarantine certificates.

China recently completed its biotechnology regulatory review of Roundup Ready soybeans and issued final safety certificates for them. These new permits are valid for three to five years, and are expected to be easier to renew. New requirements ensure that shipments of GMO



⁹ http://web.aces.uiuc.edu/faq/faq.pdl?project_id=28&faq_id=584

crops must be accompanied by details of the contract, such as the buyer, intended processor and information on any entities that will store the crop. In addition, the shipment has to include documentation showing that the government of the country in which the crop was grown has also approved the crop for sale in its own domestic market.

The fact that GMO soybeans originating from the world's leading producers are allowed to enter the two largest importing markets without hindrance does not bode well for SADC exporters. They have to compete with these major suppliers on the same terms, and any potential advantage that might have been gained from producing non-GMO soybeans has been removed, although almost all South Africa's soybean crop is genetically modified.

However, opportunities do arise in terms of not being subject to the legislation with regards to labeling of food, feed and other related products (in the case of the EU) and excessive prerequisites in contracts (in the case of China). And there is a growing market that pays a premium for organically produced and non-GM soybeans.

One constraint that arises is the extensive use of fungicides and pesticides in the non-GM production of soybeans. Production costs may be higher due to the additional use of these products, which already adds to high cost of production in SADC. Secondly, extensive use of pesticides may lead to a contravention of EU legislation, for example, where only the use of certain types of pesticides is permitted. If the amount of pesticide used to combat pests during production exceeds the maximum permissible levels under EU law, the product may not enter the region. It is necessary for the producer wishing to export to these countries to be aware of the pesticides that are approved for use or the maximum permissible levels.



7. Distribution channels

Given the fact that highest demand for soybeans is primarily for crushing, it is essential for the domestic producer to align himself with either domestic crushers or identify major crushers in international markets. However, given the highly homogenous nature and the low-value to weight ratio of the product for crush, it is unlikely that SADC exporters will be able to compete on price terms with existing major producers, given the relatively low output levels and infrastructure constraints domestically.

SADC producers and/or exporters should seek to align themselves with domestic and regional crushers. They should also seek to align themselves along the value chain for foods obtained from soybeans, which generally are of higher value on a per unit basis.

Whole soybeans

There are two types of soybeans: dry soybeans and green vegetable soybeans (edamame), which are harvested differently. Dry soybeans are harvested when fully mature and dry and can be boiled and consumed like other legumes. Green vegetable soybeans or edamame are harvested prior to maturity. It is a versatile vegetable that may be eaten as a side dish or snack, in salads and soups or with other food ingredients.

Soybean protein for food

Soybean protein is a versatile food ingredient with its functional and nutritional characteristics greatly enhancing the value of finished foods in every consumer category. Typical uses of soy in food preparation include:

Baked goods

Soy protein is used in the manufacture of breads, cookies, crackers and other baked goods. Soy protein improves texture, holds moisture, creates cake richness, whitens bread, extends shelf-life, reduces breakage and crumbling, enhances nutrition, improves manufacturing, handling and machine ability and improves mouth feel and overall quality.

Breakfast cereals

Soy protein is used extensively as an ingredient in hot cereal mixes and breakfast bars to boost protein value and quantity.

Pasta

Pasta products can be fortified with soy protein to increase nutritional value.

Beverages and toppings

Soy isolates are used in coffee whiteners, liquid whipped toppings and pre-whipped toppings. They also are used in sour cream dressings to emulsify fat, control viscosity and provide textural characteristics. Instant beverages used as meal replacements often contain soy concentrates and soy isolates as a source of protein.

Dairy-type products

A number of dairy analog products have been developed with soy protein, including imitation milk, imitation cheese, non-dairy frozen desserts, coffee whiteners, yogurt and others. Soy protein lowers cost, improves nutrition and reduces allergenic response.

Meat, poultry and fish products

Processed and whole meat products can be improved by adding soy protein, which provides the product flexibility and cost stability consumers demand. Adding soy protein to meat and poultry products can enhance moisture holding, texture, binding and cohesion, product yield, juiciness, protein quality, appetizing colour and appearance, longer shelf-life, palatability and total nutrition.

There are many more uses of soybean in food, and actual products and varieties may be found at <http://talksoy.com/FoodIndustry/overview.htm>

Soybean oil for food

Soybean oil is commonly used in the production of liquid shortening, margarines, soft spreads and low-fat spreads. It is an important ingredient in products across a diverse range and includes salad dressings, non-dairy creamers, whipped toppings, breakfast cereals, ice cream, soups, and confectionery products, cooking oils, frozen dairy desserts, peanut butter, sandwich spreads and snack foods. Soybean oil has little flavour, which is an advantage because it won't interfere with the taste of the food.

Source: <http://talksoy.com/FoodIndustry/ManufacturedProducts.htm>

There is also potential for farmers to earn higher returns from soybeans by growing certified organic soybeans for tofu which is a beloved protein rich food in Japan and China. Certified organic tofu soybeans currently garner about \$20 per bushel while certified organic feed soybeans sell for \$12 per bushel and conventional commodity soybeans go for about \$6. The yield of tofu beans is a few bushels per acre lower than conventional beans, but if the tofu beans meet quality specifications, the price makes the returns much higher than those of feed beans.¹⁰

The organic farmer must identify the market he/she intends on supplying to and determine the exact requirements to pass as certified organic foods for that region/country. Below is a table of the estimated production costs and profits/acre of organic soybean production in the US.

Table 7: Adjusting for on-farm costs in 1999

Production costs (per acre)	Organic	Conventional
Land	\$100	\$100
Certification fees	\$15	0
1999 Total Costs per acre	\$217.70	\$208.98
1999 Returns	\$14/bu x 50 bu/A-\$700	\$6/bu x 50 bu/A-\$300
1999 Profit/acre	\$482.30	\$91.02

Source: Delate (2000) - http://extension.agron.iastate.edu/sustag/pubs/Organic_Agriculture-Brochure11.doc.

¹⁰ <http://www.rodaleinstitute.org/science/soybeans.html>

Another niche market may be the use of soybean oil for bio-diesel production, with crushing facilities set up especially for this purpose. There are rapid moves toward bio-fuel production across SADC. Soybeans produced by farmers can find a market for their crops in processing plants set up for the intended purpose of producing oil to meet the demand for bio-diesel production. Alternatively, farmer organisations can help set up processing plants to service specified geographic locations, supply 'their' crusher with soybeans to produce the oil for bio-diesel production and use the left over high protein for sale to domestic livestock feed producers and food manufacturers. The aim is to satisfy domestic demand within the SADC region where domestic demand and market size is considerably smaller than the international market and where domestic producers would not be able to compete on price terms due to the lack of economies of scale.



8. Useful institutions and websites

<http://www.soybean.org> – is an ideal site for preliminary information about the food aspects of soybeans. It has useful links relating to various other aspects including meal and industrial uses. Links pertaining to the industry and related key information such as production statistics and institutions can be found.

<http://talksoy.com> – provides targeted information specific to the intended use of soybeans whether in the food, feed or industrial arenas. Additional information for the consumer is available, and includes information on the health impact of soy and products that are available to consumers.

<http://www.stratsoy.uiuc.edu/> - This is a good website with provides answers to questions around GMO, crop production and land management. It also has links to official sites and institutions with regard to market reports and related statistics pertaining to the industry ranging from seed, meal and oil production across all oilseeds and not just soybeans.

National Institute of Oilseed Products - <http://www.oilseed.org/> - an international trade association with the principal objective of promoting the business welfare of persons, firms and corporations engaged in the buying, selling, processing, shipping, storage and use of vegetable oils and raw materials. Members include importers and exporters, samplers and weighers, transportation operators, brokers, testing laboratories, storage tank operators, processors, refiners, food manufacturers, insurance companies, soap and cosmetic firms and coconut and palm plantation operators. The NIOP also strives to form strategic alliances with other organizations in the oilseeds and oils and fats industries with a list such organisations on its website.

South African Grain Information Service – <http://www.sagis.org.za/> - This is a good site that has information on production, prices and import prices across a range of seeds. It has contact details for oilseed growers, processors and storage operators.

Table 8: List of major role-players in South Africa:

	Company	Representative	Telephone	Fax	E-mail
Producers					
Oilseeds Industry	Grain SA	Mr N Hawkins	(0565) 152145	(0565) 153613	nicoh@grainsa.co.za
Processors					
Oilseeds Industry (sunflower, soybeans and ground-nuts)	SA Oil Pressers Association	Mr R Moosa	(011) 7848000	(011) 7848004	dorothy.coston@busa.org.za
	Groundnut Processors Association	Mr C Lourens	(056) 343 3311	(056) 343 2893	gnut@re.co.za
	National Chamber of Baking	Ms I van Schalkwyk	(012) 663-1600	(012) 663 1604	info@sacb.co.za
Small millers					
	Godrich Flour Mills	Mr T Godrich	(013) 9320155	(013) 9321626	tony-godrichmills@penta-net.co.za
	Small Millers Co-op	Mr P Randall	(012) 8038803	(012) 8039787	pcubed@mweb.co.za
Animal feed (Maize Industry)					
	AFMA - Animal Feed Manufacturers Association	Mr D Boshoff	(012) 6639097	(012) 6639612	dewet@afma.co.za
Storers					
Commercial grain silo owners	GSI - Grain Silo Industry	Mr P Louw	(012) 3483044	(012) 3482980	lizbe@graansilo.co.za
Traders					
	SACOTA - SA Cereals & Oilseeds Trade Association	Mr J Gordon	(011) 7848000	(011) 7848004	dorothy.coston@busa.org.za
Other					
	NAMC - National Agricultural Marketing Council	Mr S Pienaar	(012) 3411115	(012) 3411811	schalk@namc.co.za
	SA Agricultural Processors Association	Mr JF de Villiers	(012) 6631660	(012) 6633109	info@grainmilling.org.za
	SA Biofuels Association (SABA)	Mr E. Seiler	(011) 486 2775	(011) 486 3625	info@saba.za.org

Source: <http://www.sagis.org.za/>

9. Conclusion

With world soybean imports growing at an average annual rate of 17% per annum over 2000 and 2004 and close to 10% per year over the last eight years, soybeans are a rising star in the good firmament, especially given China's growth in terms of both income and soybean imports. China was the world's largest importer of soybeans with a 40% share in total world imports in 2004. Japan was the world's second largest importer with a 10% world import share in 2004. The Chinese economy's imports of soybeans grew by an astounding average annual average growth rate in excess of 32% per annum over 2000 and 2004. China does not have prohibitive tariffs on soybean imports entering its borders; it also allows GMO soybeans subject to certain requirements. Other major importing regions, the EU25, NAFTA and ASEAN, also experienced high growth rates of soybean imports of around 10% per year over the last four years with tariffs not being a major barrier to entry and GMO soybeans readily imported into these regions, including the EU25.

The supply side of the market appears to have been cornered NAFTA and South America, with these two regions making up 97% of all world exports of soybeans in 2004. Worldwide exports in 2004 saw the US, Brazil and Argentina account for 45%, 33% and 12% of total world exports of soybeans respectively. Brazil has been able to exploit its comparative advantage in agriculture, and vast land resources, to lower its production costs to approximately \$130 per ton, the lowest in the world. In addition, it has set aside more land for soybean production. Argentina's financial crisis and subsequent depreciation of the peso in 2002, made agriculture in Argentina very competitive. Argentine production and exports of soybeans has increased significantly over recent years. These two countries have been able to supply international markets at average rates of about 27% per year over the last four years, while the US's export growth was 11% per annum. This is primarily due to land constraints in the US, despite remarkable increases in yields in recent years, and a growing domestic market. Furthermore, relative to Brazil's cost of production of \$130 per ton and Argentina's \$180, the US produces one ton of soybeans at more than \$265.

It is worth remembering that the mainstream market for soybeans is that of livestock feed manufacture and that soybean oil and soy protein for food are 'by-product' market of soybeans. Soybean oil can be sold to bio-diesel manufacturers, a fast-growing market. There is a proposal for the construction of a soybean bio-diesel plant in South Africa that will require 600,000 tons of soybeans a year. Domestic production of soybeans reached a high of 424,000 tons in 2006 in South Africa, with total demand in the country approximated to be about 900,000 tons when the plant is in operation. Significant amounts of soybeans will

have to be imported to satisfy demand. This is an opportunity for other SADC countries to export to South Africa, and reinforce the already existing high volume of intra-trade within the region.

Organically grown soybeans or foods from the manufacture of organically produced soybeans receive premiums or returns for farmers that are almost twice as much as they receive for ordinary soybeans for meal¹². However, the production and effective sale of organic soybeans depends on certification that the soybeans grown meet specifications to be classified as organic soybeans. There are organisations that do facilitate this, but it is important to first identify the destination market and ascertain their specific requirements for that market as regulations may vary across countries.

It is also important to note that there are a number of issues surrounding the production of organic crops. For example, a product is considered “organic” provided that it was raised on land to which no synthetic chemical (any fertilizers, herbicides, insecticides or fungicides) inputs were applied for three years prior to its harvest. Only naturally-occurring materials are allowed in production and processing operations and all treatments must be noted in farm records. There are also issues pertaining to prescribed crop rotations on farmland that must be adhered to.

¹² This also extends to organic soybeans for livestock feed production.



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